



# Indiana State Department of Health

## Small Employer Qualified Wellness Program Application Checklist

1. Visit: <http://www.wellnesstaxcredit.in.gov> to learn about the Indiana Small Employer Qualified Wellness Program Tax Credit.
2. Click the tab to the left of the page labeled "*Application Process.*" Once there, click "*Small Employer Qualified Wellness Program Application.*" Download the application.
3. Carefully read the application.
4. Use the outline below to help guide you in completing the application.

**The following components must be included in your wellness program to receive the tax credit:**

- ☐ Employee-Appropriate Weight Loss
- ☐ Smoking Cessation
- ☐ Pursuit of Preventive Health Care Services

**For each component, complete the following information:**

- **Assessments**

- ☐ Thoroughly explain the assessments.
  - How is the assessment applicable to this component of your wellness program?
    - For example, if your employees complete a Health Risk Assessment (HRA) form, does it include Body Mass Index (BMI), height, weight, physical activity, nutrition, tobacco use, cholesterol, blood pressure, sex appropriate annual screenings, cancer screenings, or other information?
  - How does the assessment identify your employees' needs for this component of your wellness program?

- **Intervention / Education**

- ☐ Thoroughly explain the intervention methods and educational materials.
  - What intervention methods are included in your program?

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- Interventions require action and are considered to be changes in the environment, policies, and activities of a workplace in order to promote a healthy lifestyle.
  - For example, implementing a tobacco free workplace policy, physical activity and nutrition challenges, and health screenings are all considered interventions.
- Explain how the intervention and education methods are applicable to each component of your wellness program.
  - Providing healthy lunches and hosting walking challenges are examples of interventions for Employee Appropriate Weight Loss.
  - Providing education on chronic diseases or sex appropriate health topics is an example of education for Pursuit of Preventative Health Care Services.
  - Lunch n learns, pamphlets, and health coaching are also examples of education.
- **Rewards Program:**
  - ☐ Thoroughly explain the Rewards Program.
    - Remember, benefits are not accepted as rewards.
      - Benefits are offered to every employee.
      - Rewards are offered to employees based on *effort, participation, completion, and success* of certain components of a wellness program.
    - Rewards must always be offered regardless of incentives.
      - Incentives are offered to employees to help motivate them to participate in wellness program activities.
        - For example, if a free pedometer is offered to employees in order to participate in a walking challenge, the pedometer is considered an incentive.
        - HINT: Incentives are typically given at the beginning of a wellness program, or wellness program activity, while rewards are typically given at the end.
    - Thoroughly describe the rewards and how they apply to this component of your wellness program.
      - For example, if your small business hosts a walking challenge as an intervention method for Employee Appropriate Weight Loss, and the winner (or employee who exhibits the most *effort, participation, completion, and success*) is given a new pair of walking shoes, the walking shoes are considered a reward.
      - HINT: While choosing rewards, think about how they will aid employees in continuing healthy practices after they are received.
- **Measurement tool:**
  - ☐ Thoroughly explain the measurement tool.
    - Explain how your small business plans to measure the success of this component of your wellness program from year to year.

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- What method will be used?
    - Examples include, but are not limited to:
      - Aggregate data reports: annual reports that compile data to measure the validity and success of a wellness program.
      - Comparative results: comparing results from an initial assessment to the results from a final assessment to determine change over a period of time.
  - What information will be collected? How will the results be used?
    - Aggregate data reports and comparative results can help a small employer identify strengths and weaknesses in their wellness program. The wellness program can then be adjusted for the following year.
5. Review your application for completeness before submitting. Incomplete applications CANNOT be accepted for review by the Advisory Board. When complete, your application should be *no longer* than **9** pages.
6. Submit your application at: <http://www.wellnesstaxcredit.in.gov>. Click the tab to the left of the page labeled “*Application Process.*” Once there, click “*Submit your wellness plan here.*”
7. Notification that your application has been received will be received via email within 5-7 business days from the date of application submission.
8. If more information is required, or your application is incomplete, notification will be received via email within 7-10 business days from the date of application submission.
9. Notification of the status of your application will be received via email within 10-12 business days from the date of Advisory Board Review (review sessions are held quarterly).
- APPROVED applications: A certificate will be received via the US Postal Service within 10-15 business days from the date of approval.
  - DEFERRED applications: Notification of required changes to your application will be received within 10-12 business days of Advisory Board Review. You will need to make the required changes and resubmit your application for the next Advisory Board Review; and before the annual deadline of October 1.